

# STATE OF THE CLERK: EXPLORING TRENDS

## CLERKS IN ACTION

Government clerks shoulder an array of diversified tasks, among them:

- agenda and public meeting management
- document management
- records management
- public information request processing
- elections management
- services billing
- codification
- license and permit issuance

With such a wide array of tasks and responsibilities, the clerk often serves as the primary touchpoint between all other offices within a government organization.

Because of the central importance of the clerk, along with external forces affecting the job like technology, budget pressures and recruitment of the next generation of public sector workers, it's important to get a composite sketch of what the role of the clerk looks like from a global perspective.

Achieving this vantage point calls for answering some key questions:

Are clerk's offices pursuing workplace-enhancing technology?

What are the biggest challenges facing clerks now and in the future?

How has the office and individual worker experience evolved over the past decade?

How do all of these answers vary based on region and government level (city, county, state)?

Each year, Granicus sets out to answer these questions and more by conducting a wide-ranging survey about the state of the clerk. An examination of the survey results reveals not only where these offices currently stand in terms of technology deployments and workplace changes/challenges, but also suggests potential solutions to problems that exist across offices.

Methodology: Now in our second year of carrying out the survey, we have gathered feedback from the broadest organizational base possible to paint an accurate picture of the state of the clerk's office, as well as identify the ways size and organization type might account for differences in response.

We received a greater number of responses this year than our 2015 survey. Collectively, 728 individuals from the United States and Canada completed the survey this year, compared with 334 from last year. Within this group were clerks from cities, counties and states, as well as towns, villages, boroughs and other regional governments, with city clerks making up a majority of the responses once again.

The population size of the represented organizations ranged from less than 10,000 to more than 400,000. In our 2015 survey, the largest response came from clerks serving communities with populations of less than 10,000, and this held true in our 2016 survey. In addition to questions about business challenges and processes, we also asked questions aimed to assess the experience of working as a clerk, as well as some demographic questions.

**RESULTS****Citizen engagement**

As a government software vendor, Granicus has a particular interest in helping citizens connect with their government, whether local, state or federal.

This year, two new questions were added to the survey in an effort to uncover the value clerks place on citizen engagement.

When asked how important the number of citizens participating in public meetings was, 55 percent indicated it was very important; 33 percent felt it was somewhat important; seven percent thought it was critically important; and 5 percent of clerks (36 respondents) believed it was not important.

When asked how happy they were with the number of citizens participating in public meetings, half of all respondents indicated they were somewhat happy with the number; 33 percent were very happy; 15 percent were not happy, and only 2 percent felt ecstatic about the number.

**Technology purchases**

Among respondents who worked at organizations that served populations of less than 10,000 people, the percentage of those who listed support as the determining factor in purchasing new technology was higher than the overall average last year, at 28 percent. This year, however, usability stood out as the most important factor in choosing a solution, to the tune of 37 percent. Support came in second with 24 percent. In contrast, for clerks who served populations in the largest category - 400,000+ - only 32 percent selected usability as the top factor. Similar to last year, these clerks instead cited the ability to streamline workflows as the top concern when purchasing a new technology, with 42 percent.

This was the case in the City of Oakland (pop. 413,775). As a municipality that utilizes a slightly different set of processes, they had a number of complicated workflows.

**5%****OF CLERKS BELIEVED  
CITIZEN PARTICIPATION  
IS NOT IMPORTANT**

The City of Oakland's legislative process is what City Clerk LaTonda Simmons refers to as "multi-dimensional" and complex, more so than the common process of a small committee deciding on its own what will be on the agenda. Instead, citizens have a greater say in the things they care about, which demystifies the legislative process for citizens.

"There's an evolution occurring with legislative process. We have to take these municipal code-laden processes and deliverables, and we have to continue to refine our thinking about how we get that to the public."

For the 36 percent (nearly eight percent higher than last year) of respondents who stated that either

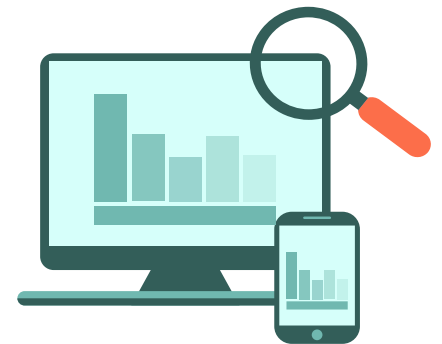
**728**   
**COMPLETED THE SURVEY**

As governments continue to upgrade their technology, so, too, does the global government applications market.

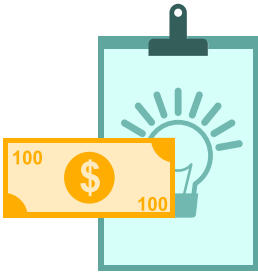
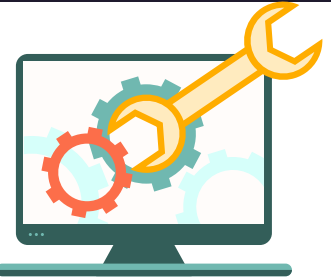
Companies within the government solutions market are making more and more advances each year.

A March 2016 Govtech.com article<sup>1</sup> cited research projecting a 2016 spending increase in the public sector of \$99.8 billion. That number has ended up being closer to \$81.5 billion<sup>2</sup>. Among our respondents, 64 percent said they or their departments had made a technology purchase within the last year. For those that hadn't, 35 percent claimed to have all the systems they need, while 33 percent stated that they didn't have the budget for new technology.

For the organizations that did make the decision to purchase technology, we asked respondents for the single greatest factor when making a purchase decision when cost was removed from the equation. The largest percentage of answers - 35 percent - stated usability was the most important factor. Other factors commonly listed included ability to streamline workflows (29 percent), support (18 percent), and experience of the vendor (4 percent).



they or their department had not made a technology purchase within the past year, the largest percentage of respondents - 35 percent - said they already had all the systems they needed. For 33 percent, however, cost was the factor that kept them from deploying new technology. A few respondents reported that new technology adoption lay solely within the IT department. Most of these percentages remain nearly the same as last year.



Some other reasons cited by small population clerks for not adopting technology in the past year were needing time to research or not having support from higher-level staff members.

### Agenda management software

Similar to 2015, 30 percent of the respondents identified the agenda and meeting preparation process as the aspect of their job that requires the most paper.

Prior to implementing agenda management software, staff members at the Borough of Emmaus, PA (pop. 11,296) relied on an entirely paper-based, manual method of agenda creation.

As items for upcoming meetings came into the Borough Manager's office, paper copies would be printed out and placed in binders for each Council member, the Borough Solicitor, and the local press.

Once the agenda binders were finalized the Friday before Council meetings (after a lot of paper shuffling and re-shuffling), the Borough Secretary would take them to the police station, and officers would deliver them to Council Members' homes. Meanwhile, a staff member would drive 14 miles to deliver a copy to the Borough Solicitor's office. In all, 10 binders – and sometimes more depending on the scope of the meeting – had to be delivered throughout the Borough.

"The amount of man hours – it was labor intensive. My officers could be doing a lot of other things besides driving packets around town," Borough Manager Shane Pepe said. "And the Borough would have to pay me and pay my mileage for driving agendas to the Solicitor's office. Our binder for the budget, for instance, was sometimes over 1,000 pages. It really was a logistical headache."

In late 2015, the Borough introduced Granicus' Agenda Management software to overhaul council meeting agenda preparation, and as a result, expect to save \$30,000 annually.

This year, agenda management software is present at 38 percent of clerk's offices represented in the survey, up from 32 percent last year. Within that group, the percentage that have built an in-house solution versus a purchased one is smaller, with 13 percent in the former category and 25 percent in the latter. For the most part, governments with agenda management software - whether built in-house or purchased - are satisfied with it. Only 14 percent of those with agenda management software said they had plans to migrate to new/different software (over periods spanning between six months and 2 years), while 86 percent reported that the solution they have now meets all of their needs.

**Our legislative process is  
"multi-dimensional"  
and complex**

### Challenges of the job

The challenges clerks face are not unlike those experienced across the rest of the public sector: being asked to do more with less, meeting the demands of the public, and dealing with HR and staffing issues. This remains unchanged from the 2015 survey.

However, as it specifically relates to the clerk function, there are several challenges that clerks will face over the next five years that concern them that are fairly unchanged from last year:



**Budgetary constraints:** A notable number of survey participants (35 percent) pointed to budget issues as a challenge. For clerk’s offices, budget cuts are not a rare thing.

Offices have to adapt to the future-focused workplace, and the technology spending that accompanies that outlook.

However, with big-ticket items like roads and infrastructure, schools, and emergency management services taking up more and more of government budgets, technology spending in the clerk’s office is often negligible, which often prevents clerk’s offices from attaining the agility they need. One survey respondent even noted that no technology purchases were authorized for their department at all.

**Transparency:** When it comes to open records and making information and data publicly available, 24 percent of clerks feel this is the biggest challenge for their profession.

With federal government placing ever-increasing importance on open government, the problem can sometimes circle back to budget constraints. However, to increase the level of engagement from citizens, transparency becomes of the utmost importance.

**Retirement:** Over the past few years, a growing concern within the public sector as a whole has been the loss of staff members from the Baby Boomer generation. As these government workers continue to retire, Millennials often take over their roles at the office. This is a concern for 16 percent of respondents, only because of the sheer number of employees who will soon be retiring or have delayed retirement. Training new employees for a job is always a challenge in and of itself, and becomes even moreso when it comes to complex legislative processes.

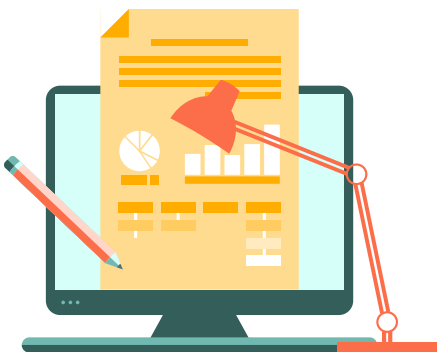
**30%**  
**AGENDA & MEETING  
PREPARATION  
PROCESS REQUIRES  
THE MOST PAPER**

**Evolution of the role:** At the end of the survey, participants were asked what they think is the greatest challenge facing their profession in the next five years. Aside from budget cuts, there was primarily a focus on the challenges posed by evolving technology.

While respondents from the 2015 survey were concerned about potential security vulnerabilities, many of this year’s respondents had different worries. One clerk cited “keeping the public happy” as one of the biggest challenges of their job. Other pervasive themes included the stress of the 2016 elections, lack of staff or funding, and keeping up with new laws.

Of the survey respondents, 45 percent were age 56 or older, with another 30 percent in the 46- to 55-year-old age group. The retirement of Baby Boomers and the anticipated staffing needs many government organizations will face as a result were seen as a major challenge facing clerk’s offices over the next five years.

Of the respondents ages 46 and older, nearly 44 percent reported they plan to retire or leave their post within the next five years, nearly half (49 percent) of the respondents 45 years or younger have been in their role less than five years, perhaps signaling that this wave of turnover is imminent and indicating the need for a plan of action to address staffing needs.



The respondents also expressed concern that the pay of a government job as compared to the private sector could hinder attracting Millennials to the government workforce as jobs open up because of retirement; a large number (18 percent) of survey respondents reported making less than \$25,000 annually. However, a larger number (21 percent) reported making over \$75,000. The rest were evenly distributed amongst the salary groupings in between.

## KEY TAKEAWAYS

The results of the survey paint a picture of what clerk's offices at every level of government look like across North America. An examination of the data illuminates several key takeaway points that speak to the current state of the clerk's office:

**Citizen engagement:** It is of particular interest to note that one of the major results from the survey that jumped out was that nearly two-thirds (62 percent) of the respondents believed that citizen involvement in public meetings was either very important or critically important, yet 65 percent were not happy or only somewhat happy with the amount of citizen involvement in their community's public meetings.



The disconnect here likely stems from the public's lack of desire to physically show up to public meetings, instead seeking ways to digitally interact with elected officials. Clerks obviously place a high level of importance on public involvement in the public meeting process, and so finding solutions to bridge the gap between a lack of public involvement and the citizenry's desire for technology could go a long way towards meeting both needs.

Live streaming public meetings with video on-demand, allowing for digital public commenting on agenda items, and producing digital minutes and voting records within minutes of a meeting's end are all viable options for bridging this divide.

**Differences in technology deployments based on population size:** For the second year in a row, we can see that when it comes to technology deployment, the data suggests clerk's offices that serve larger populations are more likely to embrace automation-based technology than their counterparts at offices serving less than 10,000 individuals. This is suggested, by the finding that 65 percent of offices relying on manual processes instead of software for agenda management serve communities of fewer than 10,000 people.

35%   
BUDGET ISSUES

Additionally, when it comes to rolling out new technology, the top thing clerk's offices serving 400,000+ populations are concerned with is the ability of the solution to streamline workflows. Clerks who serve populations with less than 10,000 people, meanwhile, want support and usability.

Data like this suggests clerk's offices for larger communities, which often have large IT support organizations, are more settled into the idea of automation-based technology becoming integrated with the workflow, whereas smaller population organizations may desire ease-of-use and support because of the lack of resources on their end. Perhaps offices serving smaller populations could benefit from the kinds of foundational tools that will offer a sense of control and organization in the move toward future-focused technology.

An evolved job atmosphere: Once again, one of the questions survey participants were asked was how their job had changed over the past 10 years. Their answers pointed to an atmosphere fundamentally different than it was a decade ago:

### Technology is more prevalent than ever

Transparency is more important to citizens than ever - some clerks have seen an increase in FOIA requests



Paperless initiatives are still being rolled out across the country

As offices are finding, tools like agenda management software and other paperless, automation-based solutions provide a quicker means of accomplishing tasks that would take much longer in a legacy environment.

A need to solve common problems: Certain problems exist across clerk's offices that still need to be solved with more efficient solutions:

Excessive paper consumption and physical file retention costs clerk's offices time, money and physical space, suggesting that perhaps a greater push should be undertaken to phase out paper reliance in favor of the more cost-effective - not to mention more reliable - alternative that electronic storage offers.

The clerks who pointed to excess paper usage as a problem still agree that pursuing a forward-focused and paperless approach to their processes should be a priority.

As previously mentioned, budgetary constraints sometimes get in the way of clerk's offices making meaningful progress with process-enhancing technology. One possible solution is for clerk's offices - and the offices to which they report - to leverage cloud-based platforms that are designed not only to fulfill the tech needs of the evolving clerk's office, but to meet the budget needs of any enterprise as well by providing a calculable return on investment. For clerk's offices, finding a dedicated platform will offer the greatest cost effectiveness.



**44%**  
**46 & OLDER PLAN TO  
RETIRE OR LEAVE  
IN THE NEXT 5 YEARS**

One of the most widespread feelings expressed by clerks was one of being overburdened. Tasks like budget preparation, meeting preparation, records management and agenda preparation all demand significant time, and it's not uncommon for a clerk to feel spread too thin.

Fortunately, for all the tasks listed above - and more - there are solutions that can take the strain off individual workers and allow departments to scale.

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## ABOUT GRANICUS

Granicus provides the industry's leading cloud-based solutions for government efficiency and transparency, with software that helps more than 1,300 organizations and 63,000 government staff members streamline their workflows and establish more meaningful connections with citizens — online, over social networks and on mobile devices. In 2015, the Center for Digital Government's Best of the Web winners named Granicus a critical partner to their online success. Granicus' solutions include live webcasting of public meetings and video archival, complete agenda and legislative management software, and tools for automating boards and commissions management processes, land and vitals records management, as well as in-meeting mobile solutions for elected officials and online feedback platforms for citizens. Additionally, Granicus provides a website content management system built specifically for government. For more information, please visit [www.granicus.com](http://www.granicus.com).

1. <http://www.govtech.com/budget-finance/2016-Market-Forecast-Where-Government-Is-Spending-Money-Technology.html>

2. <https://itdashboard.gov/>

